

LEGAL AID SERVICES OF
OKLAHOMA, INC.

2004 PRIVATE ATTORNEY INVOLVEMENT PLAN



December 2003

BUILDING A STRONGER COMMUNITY ONE CLIENT AT A TIME.

2915 North Classen Blvd., Suite 110, Oklahoma City, OK 73106, 405-557-0020

2004 Private Attorney Involvement Plan

LEGAL AID SERVICES OF OKLAHOMA, INC.

AN OVERVIEW

As the statewide legal aid organization for low-income and elderly people, Legal Aid Services of Oklahoma, Inc. (LASO) is vitally concerned with increasing access to our justice system, supporting the delivery of legal services, and broadening resources by involving the private bar. This Private Attorney Involvement (PAI) Plan outlines how we intend, during the year 2004, to continue to partner with the private bar in our efforts to provide high-quality free legal assistance to eligible clients throughout all 77 counties of the state. LASO's proposed 2004 PAI Plan was submitted for comment and input to all of the county bar associations throughout Oklahoma, and the responses received were considered and incorporated into the final plan.

This 2004 PAI Plan was developed with the recognition that LASO does not possess adequate resources to meet all the legal needs of our clients without the help of private attorneys. As in other legal aid programs, LASO's Board of Directors establishes financial eligibility guidelines each year based upon 125% of poverty for individuals applying for services. Because of our limited resources, the LASO Board and staff must also institute case and service priorities to guide us in making the hard decisions as to which types of assistance that we can provide. A Client Needs Survey was conducted in

October and November of 2002 and the teachings of that survey were incorporated into the case priorities for our agency, which are then reviewed annually by the Board of Directors. In addition to eligibility criteria and case and service priorities, this PAI Plan will also take into account input from LASO's Board and staff members.

During 2004, LASO will work with the legal profession at all levels to ensure that every bar member can help to the full extent of his or her available time, skills, and abilities. LASO will seek private attorney involvement both on a pro bono basis and on a reduced fee contract basis in some portions of the state where large geographic areas and sparse population dictate the use of contractual arrangements to ensure the availability of local attorneys. In these rural areas, special consideration will be given to problems such as staffing patterns, specific client needs, community resources, and the lack of public transportation as the same affects the accessibility of our program to low-income people. In addition to using special delivery systems, it is becoming increasingly apparent that technological improvements are critical to overcoming some of these impediments. LASO will need to continue to seek funding for technological improvements so as to deliver services better in both our urban and rural areas.

ENHANCING SERVICES STATEWIDE

In order to enhance the services that we can make available through the private bar, either on a pro bono or reduced fee contract basis, LASO will work with Oklahoma's attorneys on a statewide as well as local and individual basis. LASO has developed an

excellent working relationship with the Oklahoma Bar Association and we plan to foster this relationship during 2004 to encourage increased opportunities for private attorney involvement. The OBA became an official co-sponsor of Legal Aid's pro bono programs in the 1980's, and it had a standing Legal Services Committee for many years; LASO now is working with the new Access to Justice Committee that was instituted in 2003. With support from the OBA, LASO provides Continuing Legal Education approved seminars throughout the year that we offer for free to members of Oklahoma's pro bono panels; these free seminars both help Oklahoma attorneys to obtain their annual required MCLE credits, and also are a good way for LASO to reward existing PAI attorneys and recruit new ones. The OBA is also a co-sponsor of LASO's annual Pro Bono Honor Roll, a listing of pro bono panel member attorneys throughout all of Oklahoma's 77 counties. The OBA helps us to promote this recognition by providing copies of the honor roll to every Oklahoma attorney who attends the annual Oklahoma Bar Association convention. At the convention, the OBA provides LASO with a vendor's booth at no cost so that we can be a resource to pro bono panel members and recruit others to join in our delivery system. LASO and the OBA have in the past co-sponsored an annual evening reception for pro bono attorneys at the OBA convention each year, providing food, entertainment, and recognition for pro bono attorneys around the state who have provided valuable assistance to low-income people during the previous year. The OBA also provides a 50% discount to pro bono panel members who have donated at least 20 hours of service to a LASO client in the previous year and also honors one or more outstanding pro bono panel members with an Oklahoma Bar Association Pro Bono

Service Award during the OBA convention each year. In addition, the OBA President has been gracious each year by writing a letter to the new admittees to our bar association around the time of their swearing in, encouraging them to join with LASO in a lifetime of pro bono public service to the poor. During 2004, we hope to work for an even stronger relationship with the OBA and to seek greater recognition and support for organized private attorney involvement efforts. With the Bar's help, we will see increased publication of PAI events and recognition of attorneys' efforts in the Oklahoma Bar Association Journal through regular articles on private attorney involvement, and perhaps even a special OBA Journal issue devoted to pro bono assistance to the poor. Also on a statewide level, LASO hopes to continue its work with the Oklahoma Judicial Conference that was begun in 2002. During 2003, the OBA Access to Justice Committee made a presentation to the statewide assembly of judges and surveyed them concerning private attorney involvement and what judges can do to help improve pro bono assistance for low-income people. This Committee has also worked with the OBA General Counsel and Ethics Counsel to ensure that Oklahoma attorneys are reminded of the needs of low-income people and of our obligation to provide pro bono public service; presentations on these important subjects will be made at all Oklahoma law schools as part of the orientation programs for incoming students as well as during the ethics segments of CLE programs. We are proud of the support we are receiving in our statewide efforts to recognize and encourage pro bono assistance for low-income and elderly people.

WORKING WITH REGIONAL AND COUNTY BAR ASSOCIATIONS

In addition to our statewide focus with the OBA and the judiciary, LASO's offices promote private attorney involvement at a local level by building strong relationships with county and regional bar associations. As LASO is an approved provider of MCLE programs, we will continue to co-sponsor both live and video replay CLE events in conjunction with cooperating local bar associations. LASO's staff attorneys will be encouraged statewide to join and become active participants in the activities of their local bar associations, and we will endeavor to make presentations on the importance of pro bono service whenever possible at county and regional bar association meetings. As all of our offices serve multiple county areas, we will also encourage open houses, receptions, and other events that can bring in private attorneys from around the service areas to be recognized and recruited to join our efforts in serving Oklahoma's poor.

ENCOURAGING EACH INDIVIDUAL ATTORNEY

LASO will work directly with individual private attorneys to facilitate whatever they can do to assist eligible low-income people. Many attorneys come to see the importance of doing pro bono work because they believe and trust in the work that we do and see the need for additional resources for those cases that are deserving but cannot be handled with our limited staff. Our offices will endeavor to provide multi-faceted

alternatives so that every bar member can find some way to serve. In addition to traditional representation of low-income clients, private attorneys will be offered the opportunity to help with intake, advice and counseling in our offices, mentoring with less experienced pro bono attorneys on their assigned cases, teaching at community education or CLE events, and helping as facilitators at pro se clinics where clients do not need full-blown representation. LASO will periodically survey private attorney members of our panels to determine their interests and to ensure that they are aware of the many ways in which they can help. Our staff will also be available to provide support to those who offer to help us, either through co-counseling on matters concerning poverty law or with access to our law library and research capabilities. When need be, LASO will be able to provide limited litigation funds and costs for PAI attorneys on the cases they undertake for us, as well as access to national support resources. As noted before, to reward and recruit panel members, LASO will continue to provide free Continuing Legal Education events throughout the year, both live presentations and video replays, and will make sure that our panel members receive discounts to national support services and to Oklahoma Bar Association events when we certify that 20 hours of PAI work have been completed in a period. LASO will also endeavor to make sure that those who contribute their valuable time and efforts will be recognized in the local media as well as in our statewide efforts with the bar.

METHODS TO ENSURE QUALITY

Other than in Hotline operations and the AIDS Legal Resource Project, LASO's field offices employ a centralized staff intake process regardless of the method of service delivery, whether assistance is to be done by staff, reduced fee contract attorneys, or pro bono attorneys. This process helps to ensure quality control and allows for case follow-up that enables the program to oversee, grow, and improve its services. LASO also employs systematic quality control mechanisms over both pro bono and contract attorney cases. These methods ensure that the client is receiving the highest quality legal assistance that is available. In both of these methods of delivery involving the private bar, clients are advised of their rights to file a grievance, both in the referral letter and in the Retainer Agreement, and we will also utilize client satisfaction surveys to seek client feedback once services have been concluded. In addition, during 2004 LASO will continue to offer no cost CLE training to members of our pro bono panels in specific areas of poverty law throughout the year so that our pro bono attorneys can continue to provide the highest level of quality assistance. Quality control and accountability systems enable LASO staff to accurately report on pro bono accomplishments to board members, the public, and our funding sources.

PLANS FOR LOCAL SERVICE AREAS

In addition to LASO's overall commitment to work with the Oklahoma Bar Association and the judiciary, regional and county bar associations, and individual private attorneys, all regional law centers will also tailor their efforts to maximize private attorney involvement within their service areas. The **Oklahoma City Law Center** serves a two-county area and has both our largest eligible client population as well as a large and very active pro bono panel. For 2004, this law center will continue its work with our Oklahoma City Administration Office to provide training to pro bono panel members statewide as well as locally for the two county bar associations in its service area. The "Family Law Montage" is a daylong free CLE training for pro bono panel attorneys held at the Oklahoma Bar Center every year and features high-quality presentations by professors, staff members, and knowledgeable private attorneys in many different areas of family law. The Oklahoma City Law Center will also feature video replays of this and other LASO CLE events during the course of the year. This law center will also continue its special PAI projects, such as Saturday consumer law clinics and special outreach projects to the Passageways domestic violence shelter in Oklahoma City. The law office has a longstanding close relationship with both the Oklahoma and Canadian County Bar Associations and will also continue its work with "externs" and student volunteers from Oklahoma City University and other area colleges. The office will continue to recognize and promote pro bono assistance with regular articles in the Oklahoma County Bar Association *Briefcase* on at least a quarterly basis.

The **HIV/AIDS Legal Resource Project** (ALRP) is a statewide pro bono hotline for these special clients and their families. The project is staffed with two part-time attorney coordinators who receive calls from clients and recruit attorneys statewide on an emergency “as needed” basis. One of the major goals of the project for 2004 is increased involvement of the private bar. At present, there are nearly 200 volunteer attorneys who are listed as members of the ALRP pro bono panel and for next year letters to attorneys will be mailed both thanking them for their commitment in the past and updating the information concerning their interests in the future. It is hoped that even more clients in this important area will be able to be served in 2004 than in years past.

Our **Tulsa Law Center** has the state’s second largest pro bono panel membership and underwent a reconfiguration of its service area in 2003. The Tulsa Law Center now serves Mayes, Okfuskee, Okmulgee, Pawnee, Tulsa, Creek, and Rogers Counties. Like the Oklahoma City Law Center, Tulsa has a full-time pro bono coordinator who refers cases to volunteer attorneys, recruits new members, and helps maintain good working relationships with the bar. The pro bono coordinator has also been instrumental in helping every year with the “Fundamentals of a Divorce Case” seminar, our free statewide CLE presentation for pro bono attorneys held in Tulsa each spring. The Tulsa Law Center staff will also continue to be active in work with the Tulsa County Bar Association, including the Pro Bono, Law Week, Outreach, and Court Operations Committees. Law center staff members are also active in the TCBA Family Law Section. The office hopes to continue its work with the Rogers and Mayes County Bar Associations to co-sponsor a seminar for recruitment and training in that part of the

service area, and will also work to recruit new panel members in the Creek, Pawnee, and Okfuskee/Okmulgee County areas by sponsoring CLE video replays and with outreach efforts. In addition to work on the full representation cases, the Tulsa Law Center also will utilize pro bono attorneys and volunteer paralegals to help clients with simple pro se divorces and other self-help measures. As to the new part of the service area, the Tulsa Law Center plans to use every opportunity to publicize the Volunteer Lawyer Program and to recruit new members in these counties, with receptions and CLE presentation as well as by working closely with the existing bar associations. The Tulsa office will strive to make sure that all of its volunteers are contacted with service opportunities and will utilize group e-mail capabilities for spreading information about upcoming seminars and events, recruiting volunteers for special projects, and broadcasting information about client needs and available referrals. Our Tulsa Office will also seek to identify “pro bono coordinators” within the larger firms in the service area so as to facilitate referrals internally in those firms. Congratulatory letters will also be sent to new admittees as they join the bar within Tulsa’s service area, informing them of the workings of the Volunteer Lawyer program and the many ways in which they may be of help. Of course, our Tulsa Office will also make sure that our existing volunteers know they are appreciated by utilizing personalized thank you letters, promotional items, and special recognition during our annual United Way Day of Caring events.

Our **Lawton Law Center** also underwent changes in 2003, acquiring most of the service area of the Altus Law Office. Other than Washita County (which is now served by our Clinton office), Lawton now has oversight of the Altus Satellite Office service

area as well as that of the Chickasha Satellite Office that was already within its supervision. In addition to satellite offices in Chickasha and Altus, our staff in this service area also circuit rides to offices in Duncan, Hollis, and Hobart. For 2004, the Lawton Law Center and its satellites will continue their involvement with all active county bar associations within this large service area, will continue to partner with the Stephens County Bar Association's Legal Clinic, and plans to continue its annual "Practical Advice on Legal Issues Affecting the Poor" seminar in December at the Lawton Vo-tech Center.

For 2004, the Intake, Advice, and Referral **Hotline Law Center** will continue to utilize new resources from the Oxley Foundation to provide services to clients in the expanded Bartlesville area as well as that of the Tulsa Law Center. The Hotline functions like an emergency room for our law offices, in the sense that it receives the client's first call, attempts to provide any immediate help that seems appropriate, and otherwise prepares the case for referral on to the law center for consideration for additional representation. When the client can be helped through self-help measures, such as pro se kits and information sheets, the Hotline will attempt to provide the client with the resources that he or she needs to solve their own problem. The Hotline has also worked closely with the Court Operations Committee of the Tulsa County Bar Association to find LSC funding for a public service kiosk that is now in service at the Tulsa County Courthouse, and the Hotline manager is also working to set up LASO's informational website with help from a different LSC grant. LASO continues to look for additional resources to expand the Hotline's service area, and will try to use new lawyers, students,

and lay and pro bono volunteers to make our services more accessible. LASO hopes that eventually the Hotline will be available both in the eastern and the western part of the state, such that a client will be able to call one telephone number for assistance anywhere within our 77 county statewide service area.

In 2004, the **Norman Law Center** will have a five-county service area with a satellite office in Shawnee. The office hopes to continue its work of building personal relationships with attorneys throughout the service area and finding new and additional resources for legal assistance for clients. All attorneys with the Norman office will attend and be active in Cleveland County bar meetings, as this is the largest attorney base in the service area and represents the best source for additional pro bono panel recruits. The office hopes to continue having an officer on the Executive Board of the Cleveland County Bar Association, will participate in Law Day activities, and will try to provide at least one speaker for the CLE portion of the county bar association meetings/trainings during the upcoming year. The attorneys who are assigned to represent clients in the various counties within the service area will participate with and maintain membership in the local county bar associations there. The office will also urge at least one legal aid services presentation as a part of these county bar association meetings during the course of the year. The Norman office plans to continue its overall practice of recruiting local attorneys and law students for intake and advice for clients and will continue to work with the law school to review possible ways in which to increase law school participation in the program. As with other LASO offices, the Norman Law Center will continue to review all eligible clients for possible PAI assignments.

The **Hugo Law Center** located in far southeastern Oklahoma has been responsible for our annual “Gotcha” consumer law seminar and hopes to continue to help LASO facilitate this excellent free training to pro bono attorneys statewide during 2004. The office also plans to conduct video replays of CLE seminars with the Bryan and Choctaw County Bar Associations and will hold approximately 6-8 pro bono pro se divorce clinics for clients who can benefit from a volunteer lawyer’s help concerning how to do their own dissolution proceeding. The **Poteau Law Center** has also become a satellite of Hugo, and the LeFlore County Bar Association will join with us in sponsoring a video replay as a part of our outreach to pro bono attorneys in this important part of our service area. Hugo and Poteau will also hold end-of-year receptions and open houses for pro bono attorneys to create more understanding and recruit more resources for our work on behalf of the poor.

The **Clinton Law Center** in western Oklahoma is our largest geographic service area and acquired responsibility for serving Washita County in 2003. The office has a satellite in Woodward and utilizes a mixed delivery system of staff attorneys and paralegals, pro bono volunteer attorneys, and reduced fee contracts in the northwest area where the population is more sparse. The Clinton Law Center plans to work with all active county bar associations in its service area and to continue to recruit both pro bono and reduced fee contract attorneys to see clients in this large service area. The Clinton Office also plans to hold a video CLE replay and supply free forms and materials to its panel members, as well as reach out with congratulatory and introductory packets to new attorneys who have only recently been admitted to the bar or moved to the area.

Our **Bartlesville Law Center** reconfigured in 2003 and acquired Ottawa and Delaware Counties and the **Jay Law Office** as a satellite. The Bartlesville office will work closely with its new county bar associations and will also maintain its strong relationship with the Washington County Bar, especially its Elder Law Committee. In years past, the Bartlesville Law Center has worked closely with the Washington County Bar to conduct an annual live CLE seminar for pro bono panel members and plans to do so again during 2004. The office will also maintain its close working relationship with the Tri-County Vo-Tech paralegal program in Bartlesville so that more clients can be assisted through cooperative efforts with volunteers from this educational institution.

The **Ardmore Law Center** assumed responsibility for Garvin County in its service area in 2003 and will continue with its satellite office in Ada. The office will work closely with its major county bar associations and plans on conducting two video replays and receptions as a means of rewarding and recruiting additional pro bono panel members.

The **Muskogee Law Center** became responsible for Adair and Cherokee Counties along with its new satellite office in **Stilwell** while shifting responsibility for Okmulgee and Okfuskee Counties to our Tulsa Office. The office promises to continue to work on pro se clinics for clients who can be assisted with limited pro bono assistance, and will also look to offer a seminar and recruit new pro bono panel members for representation cases, both within its existing county bar associations and in the new additions to its service area.

Our **Stillwater Law Center** has a large geographic area in north central

Oklahoma. In 2004, the office will continue its efforts to build strong relationships with the county bar associations and will conduct video replays of LASO's major CLE events in conjunction with its work with the local bar associations. Although the Stillwater office has no satellite, it does attempt to maintain strong relationships with the larger bar communities in Ponca City and Enid as well as throughout the rural counties that it serves.

LOOKING TO THE FUTURE

As LASO builds our new statewide organization, we are seeking to make the recommendations contained in our state planning efforts a reality. LASO will continue to work closely with law schools and law students to promote a lifetime commitment to pro bono work as well as with the Oklahoma Bar Association to provide greater official recognition of the volunteer work that Oklahoma lawyers do. We believe that additional attorneys may be brought into service on behalf of clients who only need limited assistance with pro se representation, and that community education information for the poor will be more important as a new type of assistance, both on our website and locally, than has been possible before. LASO's Private Attorney Involvement Plan is part and parcel of our program's long-range goal of promoting full and equal access to our system of justice. It is LASO's belief that the private bar can and should play an integral role in the provision of legal services to the poor.